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## Quarterly Report Protocol

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- On a quarterly basis, Local Agency Coordinators will complete and submit the quarterly report form accompanied by applicable supporting documents to the Nutrition Services Compliance Manager.

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### Forms

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- The Forms to be completed:
  - Quarterly Report Form (for current fiscal year)
  - Staff Training Log
  - Copy of the Civil Rights Sign-in sheet once completed
  - Semi-Annual Certification Form (Keep on-site: reminder 2<sup>nd</sup> and 4<sup>th</sup> quarter)
  - Peer Counseling Enhancement Plan and Quarterly Review
  - Fiscal Operating and Personnel Detail Reports ( IBIS Query)

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### Purpose

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- The purpose of the quarterly report is to measure LA performance and progress towards meeting their Nutrition Education Plan goals and objectives, creating corrective action plans in response to monitoring findings, and changes related to monitoring recommendations. The Peer Counseling report helps State understand program progress and how to best provide technical assistance. Fiscal and Operating detail report will help assure fiscal accountability.

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### Procedures

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- Quarterly reports forms will be sent to LA Coordinators **January 1<sup>st</sup>, April 1<sup>st</sup>, July 1<sup>st</sup>, and October 1<sup>st</sup>** by the Nutrition Services Compliance Manager. The form is also available on the Idaho WIC website.
- During the 2<sup>nd</sup> and 4<sup>th</sup> Quarter an additional reminder will be sent for the semi-annual certification form. This will not be obtained by the State office, but stored onsite by the LA for review during onsite monitoring.
- Please submit applicable support documents with the QR form. You may submit documents you feel are necessary. At minimum the following support documents must be submitted:
  - Q#4: Caseload should be reviewed. If caseload is < 97% for two consecutive quarters, then the Corrective Action Plan Form should be completed and submitted with the QR (Only need to submit caseload corrective plan once per year, follow-up is required on the QR).
  - Q#7: Percent no-show for each clinic and back-up documentation for how it was calculated.
  - Q#7: Last 30-days of prenatal logs for each clinic.
  - Q#8: Copy of civil rights training sign in sheet annually (or proof that staff completed the training).

- Q#8: Staff Training Log should be submitted quarterly.
- Q#12: The peer counseling enhancement plan with updates for the quarter.
- Q#13: Financial attachments to be submitted (Fiscal, Operating Detail Report -IBIS Query, Personnel Detail Report, and time study-if applicable).
- Q#15: Updated master list of eligible institutions. This is submitted with 2<sup>nd</sup> quarter report
- Quarterly reports will be due **January 31<sup>st</sup>, April 30<sup>th</sup>, July 31<sup>st</sup>, and October 31<sup>st</sup>** by the end of the business day. The local agency Coordinator must electronically submit a copy of the completed forms and attachments to the Nutrition Services Compliance Manager at the State Office:

Emily Decker RD, LD, CDE  
P: 208-334-5919  
[emily.decker@dhw.idaho.gov](mailto:emily.decker@dhw.idaho.gov)

- The State office will use the comment form to complete sections. The comments form will be sent back to coordinators 30 days after receiving the report from local agencies.
  - **Green: under Completion, Needs Improvement and Positive Feedback.**
  - **Orange: Questions and/or Needs More Information**
- LA Coordinators will use the comment form to complete sections in orange and blue. The comments form will be sent back to the State Agency 30 days after receiving the report from local agencies. *The Clinic Coordinator will alert the coordinator in the email if no anticipated comments are expected.*
  - **Orange: Questions and/or Needs More Information.** Please provide answers to questions posed.
  - **Blue: under Proposed Solution and LA Action Plan.** Please provide any solutions proposed or actions that will be taken in response to comments.
- LA Coordinators may not have to respond to the sections of the comment form, only areas where information has been requested by the State Agency. If you feel you would like to make a response comment either way that is fine. While there may not be actual questions or comments requiring a response, the action plan could be as simple as a date one of the completed sections is anticipated to be done (i.e. the civil rights training or a pending corrective action plan).